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# USER TRAINING STRATEGY

## Department of Transportation

### DELPHI Program



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## Introduction

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### Purpose

The purpose of this document is to provide user profiles, training audience, and training methods for the DELPHI user training.

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### Background

Due to a changing technological environment, availability of different training methods, and changing customer needs, training for DELPHI must take an innovative and aggressive approach. It is important that we provide a training package that is timely, relevant, well planned, accessible, and accurate. Untrained users will spend three to six times the number of hours to reach the same level of functionality as trained users; therefore, it is essential that we plan effectively to train all system users. Our strategy will provide the means for managers to take responsibility to ensure their employees will be adequately trained.

Our intent is to use a combination of selected training methods to develop a comprehensive training program that:

- Considers the needs of all organizations in DOT
- Promotes positive change by utilizing the training tools and leveraging the talent in our user community
- Creates and fosters a customer-focused environment.

The result of this investment will be:

- Data integrity in the system
  - Understanding by each user of the impact of individual actions on the system
  - End user buy-in
- 

### Related Documents

1. Program Charter for the DELPHI Program
2. Control and Reporting Procedures for the DELPHI Program
3. Quality Plan for the DELPHI Program
4. Documentation Management Plan for the DELPHI Program
5. Communication Plan for the DELPHI Program

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## Training Coordination

This worksheet contains the training coordinators for each site where Oracle Financial Applications training will be conducted. If changes or cancellations occur, the coordinator for each site will communicate the changes to the attendees.

Site Name	Training Coordinator	Title	E-mail Address	Phone
MMAC	tbd	DELPHI Communications and Training Leader		
MMAC	tbd	Oracle Training Coordinator for DELPHI program		
FTA	tbd			
USCG	tbd			
FAA	tbd			
FHWA	tbd			
FRA	tbd			
NHTSA	tbd			
MARAD	tbd			
VOLPE	tbd			

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## User Profiles

Financial system users primarily fall into the following categories:

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### Management

All current and potential users will need training. The knowledge required by this user category is:

- Reporting
- Inquiries

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### Program Managers and Administrative Assistants:

All current and potential users will need training. The knowledge required by this user category is:

- Reporting
- Inquiries

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### Budget Supervisors and Analysts:

All current and potential users will need training. The knowledge required by this user category is:

- Reporting
- Inquiries

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### Accounting Operations Supervisors and Technicians:

All current and potential users will need training. The knowledge required by this user category is:

- Origination points entry functions
- Reporting
- Inquiries

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### Document Originators:

All potential users at a point of entry will need training. Training for this group will be determined by the Operating Administrations. Super users will deliver this training. The knowledge required by this user category is:

- Origination points entry functions
- Reporting
- Inquiries

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## Training Audience

The following charts contain an analysis of either current or potential financial system users that fall into the categories listed above:

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### Summary of Current/Potential Users

Current and Potential Users							
Dept of Transportation			Accounting		Budget/Program Managers	Document Originators	Total
OA	Agy/Reg/Dist		Supervisors	Techs	Reporting and Inquiry	Data Entry, Reporting and Inquiry	
FTA	9	ALL	4	48	12	tbd	64
USCG	2	ALL	26	263	143	tbd	432
FAA	1	ALL	52	365	592	tbd	1009
FHWA	4	ALL	50	157	42	tbd	249
FRA	5	ALL	2	10	20	tbd	32
NHTSA	8	ALL	1	4	13	tbd	18
MARAD	D	ALL	5	17	8	tbd	30
VOLPE	3	ALL	3	12	71	tbd	24
Totals			147	877	834		1858

## Federal Transit Administration Current/Potential Users

Users in the Federal Transit Administration include the [Office of the Secretary \(OST\)](#), [Transportation Administrative Service Center \(TASC\)](#), [Bureau of Transportation Statistics \(BTS\)](#), and the [Surface Transportation Board \(STB\)](#).

Current and Potential Users							
Dept of Transportation			Accounting		Budget/Program Managers	Document Originators	Total
Entity	Agy/Reg/Dist		Supervisors	Techs	Reporting and Inquiry	Data Entry, Reporting and Inquiry	
FTA HQ	9	1				tbd	
Region 1	9	1				tbd	
Region 2	9	1				tbd	
Region 3	9	1				tbd	
Region 4	9	1				tbd	
Region 5	9	1				tbd	
Region 6	9	1				tbd	
Region 7	9	1				tbd	
Region 8	9	1				tbd	
Region 9	9	1				tbd	
Region 10	9	1				tbd	
Totals			4	48	12		64

## United States Coast Guard Current/Potential Users

Current and Potential Users							
Dept of Transportation			Accounting		Budget/Program Managers	Document Originators	Total
Entity	Agy/Reg/Dist		Supervisors	Techs	Reporting and Inquiry	Data Entry, Reporting and Inquiry	
Boston (Dist 1)	2	1				tbd	
St. Louis (Dist 2)	2	2				tbd	
New York (MLC)	2	3				tbd	
Honolulu (Dist 14)	2	4				tbd	
Portsmouth (Dist 5)	2	5				tbd	
MLC Pacific	2	6				tbd	
Miami (Dist 7)	2	7				tbd	
New Orleans (Dist 8)	2	8				tbd	
Acquisition	2	A				tbd	
Supply Center	2	B				tbd	
Cleveland (Dist 9)	2	C				tbd	
Engineering & Dev	2	E				tbd	
Chesapeake Fin Cen	2	F				tbd	
Headquarters	2	H				tbd	
Juneau (Dist 17)	2	J				tbd	
Long Beach (Dist 11)	2	L				tbd	
Elizabeth City	2	N				tbd	
Operations	2	O				tbd	
Personnel (Programs)	2	P				tbd	
Personnel (Units)	2	Q				tbd	
Seattle (Dist 13)	2	S				tbd	
Command	2	T				tbd	
West Coast Fin Cen	2	W				tbd	
CG Yard	2	Y				tbd	
Oil Pollution Fund	2	Z				tbd	
Totals			26	263	143		432

## Federal Aviation Administration Current/Potential Users

Users in the Federal Aviation Administration include the [Research and Special Programs Administration \(RSPA\)](#) excluding Volpe Center, and the [Office of the Inspector General \(OIG\)](#).

Current and Potential Users							
Dept of Transportation			Accounting		Budget/Program Managers	Document Originators	Total
Entity	Agy/Reg/Dist		Supervisors	Techs	Reporting and Inquiry	Data Entry, Reporting and Inquiry	
Aero Center	1	A	5	70	85	tbd	160
Tech Center	1	T	1	23	10	tbd	34
Washington	1	W	6	45	127	tbd	178
Eastern/NE Region	1	1	7	25	110	tbd	142
Southwest Region	1	2	3	20	41	tbd	64
Central/GL Region	1	3	12	66	23	tbd	101
Southern Region	1	4	4	44	71	tbd	119
Alaskan Region	1	5	1	21	26	tbd	48
Southern Region	1	7	13	51	99	tbd	163
Totals			52	365	592		1009

## Federal Highway Administration Current/Potential Users

Current and Potential Users							
Dept of Transportation			Accounting		Budget/Program Managers	Document Originators	Total
Entity	Agy/Reg/Dist		Supervisors	Techs	Reporting and Inquiry	Data Entry, Reporting and Inquiry	
FHWA HQ	4	H				tbd	
Fed Aid Reg 1	4	H				tbd	
Fed Aid Reg 3	4	H				tbd	
Fed Aid Reg 4	4	H				tbd	
FedAid Reg 5	4	H				tbd	
Fed Aid Reg 6	4	H				tbd	
Fed Aid Reg 7	4	H				tbd	
Fed Aid Reg 8	4	H				tbd	
Fed Aid Reg 9	4	H				tbd	
Fed Aid Reg 10	4	H				tbd	
Fed Aid States	4	H				tbd	
Fed Land Reg 15	4	H				tbd	
Fed Land Reg 16	4	H				tbd	
Fed Land Reg 17	4	H				tbd	
Totals			50	157	42		249

## Federal Railroad Administration Current/Potential Users

Current and Potential Users							
Dept of Transportation			Accounting		Budget/Program Managers	Document Originators	Total
Entity	Agy/Reg/Dist		Supervisors	Techs	Reporting and Inquiry	Data Entry, Reporting and Inquiry	
FRA HQ	5	1				tbd	
Region 1	5	1				tbd	
Region 2	5	1				tbd	
Region 3	5	1				tbd	
Region 4	5	1				tbd	
Region 5	5	1				tbd	
Region 6	5	1				tbd	
Region 7	5	1				tbd	
Region 8	5	1				tbd	
Totals			2	10	20		32

## National Highway Traffic Safety Administration Current/Potential Users

Current and Potential Users							
Dept of Transportation			Accounting		Budget/Program Managers	Document Originators	Total
Entity	Agy/Reg/Dist		Supervisors	Techs	Reporting and Inquiry	Data Entry, Reporting and Inquiry	
NHTSA HQ	8	W				tbd	
Region 1	8	W				tbd	
Region 2	8	W				tbd	
Region 3	8	W				tbd	
Region 4	8	W				tbd	
Region 5	8	W				tbd	
Region 6	8	W				tbd	
Region 7	8	W				tbd	
Region 8	8	W				tbd	
Region 9	8	W				tbd	
Region 10	8	W				tbd	
Totals			1	4	13		18

## Maritime Administration Current/Potential Users

Current and Potential Users							
Dept of Transportation			Accounting		Budget/Program Managers	Document Originators	Total
Entity	Agy/Reg/Dist		Supervisors	Techs	Reporting and Inquiry	Data Entry, Reporting and Inquiry	
MARAD HQ	D	1				tbd	
Western Reg	D	1				tbd	
Central Reg	D	1				tbd	
G/L Reg	D	1				tbd	
N Atlantic Reg	D	1				tbd	
S Atlantic Reg	D	1				tbd	
MARAD ACAD	D	5				tbd	
Totals			5	17	8		30

## Volpe Center Current/Potential Users

Current and Potential Users							
Dept of Transportation			Accounting		Budget/Program Managers	Document Originators	Total
Entity	Agy/Reg/Dist		Supervisors	Techs	Reporting and Inquiry	Data Entry, Reporting and Inquiry	
Volpe Ctr	3	1	7	13	4	tbd	
Totals			7	13	4		24

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## Training Model

Using the implementation strategy outlined in the DELPHI Program Charter and recommended training methods, a training program model that incorporates (1) *basic navigation skills training*, (2) *role-based training*, and (3) *cross-functional understanding* has been developed.



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## Advance Preparation

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### Training Program

There will be a cadre of super users – two to six from each operating administration (OA), depending on size and at least one from each DELPHI Program Team. We will place an emphasis on *vendor-provided* and *train-the-trainer* courses to assist in their development. This will occur during the Global Build/Pilot Phase of the Program.

Super users play critical roles at each level. It is important to develop super users and bring *cross-functional* super users together early in the process to develop a broader understanding of each group's role in the enterprise. Super users assume the following roles:

- **Expertise:** Super users become the software experts within each operating administration.
- **Coaching:** Super users troubleshoot individual problems and questions for other employees.
- **Processes and Communications:** Super users interact with other super users to identify and implement business process changes or improvements.
- **Skills Assessment:** Super users will participate with the DELPHI Program Team to identify software transaction skills and develop software *skills assessment* tools. Skills assessment tools will be used on an ongoing basis to determine the skill level of each employee. These tools will be developed by super users in all Operating Administrations during the Global Build/Pilot Phase of the Program. A sample skills assessment is provided in Appendix 2.
- **Training:** Super users will participate with the DELPHI Program Team to develop *role-based standard classroom/lab instruction* and *interactive video* to be used at startup, for new employees, new processes, and process changes. The outline for this training material is based on skills assessment tools. Required individual skills will be determined for each area and training is focused on the skills in these areas. Role-based training material is focused on the roles people perform in the workplace; i.e., accounts payable, general ledger, program management, etc. These training documents will be developed by super users in all Operating Administrations during the Global Build/Pilot Phase of the Program. Training for each operating administration is augmented to reflect the specific DELPHI setups during their respective operating administration installations in the OA Deployments Phase.
- **Online Help:** Super users from the Operating Administrations and DELPHI Program Team will be responsible for developing online help to supplement the vendor-provided help file. Online help is developed in unison with the setup and definition of the DELPHI software. Initially this takes place during the Global Build/Pilot Phase of the Program, but continues into the OA Deployments Phase.

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### Deliverables

What	Who is Responsible	When
<i>Train-the-trainers</i> training	Oracle	See DELPHI Program work plan

<i>Vendor-provided training</i>	Vendor(Oracle or some other provider)	See DELPHI Program work plan
<i>Skills Assessment Tools</i>	Super users and DELPHI Program Team	Global Build/Pilot Phase – See Program work plan
<i>Role-based training material for standard classroom/ lab instruction and Interactive Video</i>	Super users and DELPHI Program Team	Global Build/Pilot and OA Deployments – See Program work plan
<i>Online help</i>	Super users and DELPHI Program Team	Global Build/Pilot and OA Deployments – See Program work plan

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# Implementation Training

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## Training Program

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### Management, Program Managers, Administrative Assistants, Budget Supervisors and Analysts

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All users requiring training for reporting and inquiries will be trained initially in *interactive video (IVT)* sessions. The material used in these sessions will have been developed specifically for this group of personnel by the super users during the Advance Preparation stage and is *role-based*. Therefore it can be delivered by super users or by the DELPHI Program Team at a time agreed upon by all parties – as defined in the Program work plan.

For additional assistance and subsequent to their initial exposure to the material, this group of users will participate in talk-back *deskside coaching* sessions with the super users from their respective Operating Administrations.

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### Accounting Operations Supervisors and Technicians

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This user group, or any user who performs data entry at origination point, requires the following training:

- One week prior to implementation - Receives *vendor-provided basic navigation* training. A lab is set up on-site by the operating administration hosting the training. The vendor provides the materials and conducts the training, discussions, and the lab work. Lab exercises for all users is required during this training. The group is then divided into smaller groups by the type of function that they perform. Operating administration super users and/or members of the DELPHI Program Team then conduct *standard classroom/lab instruction* using the *role-based training* developed in the Advance Preparation stage. It is important that users begin to make the transition and to understand how their functions will be performed in the new environment. The *role-based training* facilitates this process. Appendix 1 contains a training preparation checklist to assist the DELPHI Program Team to prepare for training.
- Week of implementation – During the first week of live operation, *deskside coaching* will be performed to assist individuals with their work. This is accomplished by super users and DELPHI Program Team. It is important that by the end of this week each user feels comfortable that he or she can complete the given assignments. A training evaluation is completed by each user.

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## Deliverables

What	Who Receives	When
<i>Interactive video (IVT)</i> - given by super users and DELPHI Program Team	Management, program managers, administrative assistants, budget supervisors and analysts	As close to the actual implementation date as possible – See DELPHI Program work plan
<i>Vendor-provided basic navigation</i> training	Accounting operations supervisors and technicians	One week prior to implementation - each operating administration
<i>Standard classroom/lab instruction</i> using the <i>role-based training</i> given by super users and DELPHI Program Team	Accounting operations supervisors and technicians	One week prior to implementation - each operating administration
<i>Deskside coaching</i> - given by super users and DELPHI Program Team	Management, program managers, administrative assistants, budget supervisors and analysts, accounting operations supervisors and technicians	First week of live operation after implementation - each operating administration

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## Follow-up

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### Training Program

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#### First Month End

At the end of the first month of live operation, *deskside coaching* is again provided to assist individuals with their month-end processing functions. This is accomplished by super users in the Operating Administrations and/or members of the DELPHI Program Team. It is important that each employee receives personal help to answer any questions that may have arisen since implementation.

Super users will also hold small group sessions with employees during this time to discuss lessons learned and share information. Skills assessment tools will be administered at this time. Information gained in this assessment will be used to determine future resources and training required for each participant and to determine the emphasis that super users should use to help their respective Operating Administrations make their transition.

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#### Subsequent Visit

At a time determined by the operating administration and DELPHI Program Team, *deskside coaching* is again provided to assist individuals. This is accomplished by super users in the Operating Administrations and/or members of the DELPHI Program Team. Subject matter for this *deskside coaching* session is primarily based on the skills assessment information collected at the end of the first month.

Super users will hold small group sessions with employees during this time to discuss lessons learned, share information, and begin planning for future internal sessions and revising training documentation if needed.

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### Deliverables

What	Who Receives	When
<i>Deskside coaching</i> - given by super users and DELPHI Program Team	Management, program managers, administrative assistants, budget supervisors and analysts, accounting operations supervisors and technicians	Month end and at a subsequent visit - each operating administration
Skills assessment	All users	Month end

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## Ongoing

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### Training Program

Ongoing activities in the training model follow. These activities encourage *cross-functional understanding* and develop an increased knowledge base across the Department.

- Feedback for continuous improvement for all types of training is encouraged. Super users will be encouraged to solicit informal comments from people in their functional areas about the *roles-based* training classes.
- Super users will be expected to increase their training skills through *train-the-trainer* workshops and off site *vendor-provided* software education classes.
- Super users will be responsible for updating and improving *role-based* training material as needed.
- Super users host periodic user group meetings to discuss new functionality, demonstrate problem-solving techniques, and share knowledge with super users from every operating administration. They also develop a working knowledge of how individual actions impact the other parts of the system.
- Super users and any users who require *cross-functional* knowledge participate in on-site demonstrations by software consultants, local seminars, regional user group meetings, and national user group meetings.
- Users participate in talk-back *deskside coaching* sessions with the super users from their respective Operating Administrations. These sessions will be held monthly or bi-monthly.
- Periodic skills assessments will be given to all users. Information collected from these skills assessments and from employee feedback will be used to place employees in basic navigation reviews, provide training of the topics they require, or identify their ability to teach someone else.
- New users will be given *basic navigation* training. Super users of their respective Operating Administrations will be responsible for either delivering the training using vendor-provided material or contracting with a vendor to provide the training. New users will be also given *role-based* training applicable to them. This training may be delivered by a super user or other employee knowledgeable in this area.
- Super users in the DELPHI Program Team continually update the *online help* with new information pertinent to the Department of Transportation users of the DELPHI software.

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## Deliverables

What	Who is Responsible	When
<i>Train-the-trainers</i> training for super users	Vendor	As needed
<i>Vendor-provided</i> training for super users	Vendor	As needed
<i>Deskside coaching</i> sessions for all users	Super users	Monthly or bi-monthly
<i>Online Help</i>	Super users and the DELPHI Program Team	Ongoing
<i>Standard classroom/lab instruction</i> for basic navigation skills and role-based training for new employees.	Super users	As needed
Skills assessment	All Users	Periodically

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## Appendix 1 -- Training Preparation Checklist

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### Technical Environment

- |   |                   |       |
|---|-------------------|-------|
| <input type="checkbox"/> INSTALLATION Contact               | <b>Contact:</b>   | _____ |
| <input type="checkbox"/> INSTALLATION Scheduled             | <b>Date:</b>      | _____ |
| <input type="checkbox"/> INSTALLATION Completed             | <b>Date:</b>      | _____ |
| <input type="checkbox"/> Printer Available                  | <b>Name:</b>      | _____ |
| <input type="checkbox"/> Concurrent Manager Startup script  | <b>Path/Name:</b> | _____ |
| <input type="checkbox"/> Products installed                 |                   |       |
| <input type="checkbox"/> Confirmation completed             | <b>Date:</b>      | _____ |
| <input type="checkbox"/> Space adequate for number of users |                   |       |
| <input type="checkbox"/> RDBMS & Application Compatibility  |                   |       |

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### Training Resources

- |   |                |       |
|---|----------------|-------|
| <input type="checkbox"/> Number of Trainees   | <b>Number:</b> | _____ |
| <input type="checkbox"/> List of Trainees, Disciplines                                  |                |       |
| <input type="checkbox"/> Facilities adequate for expected number of trainees            |                |       |
| <input type="checkbox"/> Phone in training room   | <b>Number:</b> | _____ |
| <input type="checkbox"/> Navigation Training Completed                                  |                |       |
| <input type="checkbox"/> Introduction to Applications Object Library Training Completed |                |       |
| <input type="checkbox"/> Dependent Products Training Completed                          |                |       |
| <input type="checkbox"/> Navigation Documentation Provided (Optional)                   |                |       |
| <input type="checkbox"/> Operating System Users: User Names, Passwords                  |                |       |
| <input type="checkbox"/> Application Users: User Names, Passwords                       |                |       |
| <input type="checkbox"/> Sign-on Instructions   |                |       |
| <input type="checkbox"/> Keyboard Mapping Template                                      |                |       |
| <input type="checkbox"/> Reference Manuals  |                |       |
| <input type="checkbox"/> Training Class Notes   |                |       |
| <input type="checkbox"/> White Board, markers, flip charts                              |                |       |
| <input type="checkbox"/> Overhead Slides  |                |       |
| <input type="checkbox"/> Overhead Projector   |                |       |
| <input type="checkbox"/> Issues List Template   |                |       |

- ☐ Training Agenda
- ☐ Evaluation Sheets- Classroom
- ☐ Evaluation Sheets- Instructor

## Follow-Up

- ☐ Secondary Technical Contact
- ☐ Secondary Technical Contact
- ☐ Dial out instructions (Attached)
- ☐ Local Oracle node
- ☐ System Administrator
- ☐ System Administrator
- ☐ DBA
- ☐ DBA
- ☐ SQL\*Plus FIN Access
- ☐ SQL\*Plus FIN Access

**Name:** \_\_\_\_\_

**Phone:** \_\_\_\_\_

**Number:** \_\_\_\_\_

**Name:** \_\_\_\_\_

**Phone:** \_\_\_\_\_

**Name:** \_\_\_\_\_

**Phone:** \_\_\_\_\_

**Username:** \_\_\_\_\_

**Password:** \_\_\_\_\_

## Products Installed

- |   |   |
|---|---|
| <input type="checkbox"/> Assets             | <input type="checkbox"/> Federal General Ledger |
| <input type="checkbox"/> Cash Management    | <input type="checkbox"/> Federal Payables       |
| <input type="checkbox"/> Financial Analyzer | <input type="checkbox"/> Federal Receivables    |
| <input type="checkbox"/> Inventory          | <input type="checkbox"/> Federal Purchasing     |
| <input type="checkbox"/> Order Entry        |   |
| <input type="checkbox"/> Project Billing    | <input type="checkbox"/> Project Costing        |

### Internet:

- ☐ Application for the Web

## Appendix 2 – Sample Skills Assessment

### Skills Assessment Role-Based Training for AP Specialists

**Check** the response that best matches your experience. **Circle** (or highlight) the 5-10 skills that relate to areas where you need additional (or refresher) training in order to use the system more effectively.

Skills	Proficiency							
	Does not apply to my job	I don't know how	I need help	I can do with written steps	I can do with some help	I can do without help	I can explain what I am doing	I can teach someone else
Basic Navigation Skills								
Set profile options								
Use concurrent manager								
<b>Invoices</b>								
Enter an invoice or update								
Review invoices by vendor								
Modify invoice payment schedule								
Adjust invoice distributions								
Manually release invoice holds								
Enter an expense report								
Create recurring payment invoices								
Define a recurring payment								
<b>Vendors</b>								
Enter a vendor								
Review a vendor								
<b>Payments</b>								
Automatic								
Select invoices for payment								
Modify selected invoices								
Format invoice payments								
Confirm a payment batch								
Manual								
Enter a manual payment								
Review payments								
Stop a payment								
Void a payment								
Prepayment								
Enter a prepayment								
Select prepayment and apply to invoices								
<b>Reports</b>								
Submit payables reports and sets								
Submit Expense Detail report								
<b>Tasks</b>								
Initiate AutoApproval								

Proficiency								
Skills	Does not apply to my job	I don't know how	I need help	I can do with written steps	I can do with some help	I can do without help	I can explain what I am doing	I can teach someone else
Write off AP accruals								
Create journal entries for invoices and payments								
<b>Setup</b>								
Invoices								
Define payment terms								
Define distribution set								
Define matching and tax tolerance levels								
Define invoice approvals								
Define an expense report type								
Define a standard invoice note								
Banks								
Define a bank, account, and payment documentation								
Organization								
Enter/view an employee								
Define a location								
Reports								
Define an Expense Detail report								
Define Invoice Aging periods								
Define a report set								
System								
Define system options, defaults								
Define payables QuickCodes								
Define vendor QuickCodes								
Define periods for key indicator reports								
<b>Controls</b>								
Merge invoices and purchase orders for a vendor								
Reset payment batch status								
Adjust a manual payment								
Fix invalid payment distributions								
Maintain accounts payable period statuses								
Review invoice distributions								